Lotus Notes® 8.5.1

Standard

QUICK REFERENCE GUIDE

Getting to Know Lotus Notes 8.5.1

Lotus Notes 8.5.1 includes a host of new features, including expanded right-click menus, smarter auto-complete, drag and drop between rich text and name fields, and calendar overlays. New preference options allow users to change unread messages to display in red, increase default font size, automatically correct common spelling errors, and enlarge bookmark icons. This guide highlights key changes in Notes and includes a list of keyboard shortcuts and icons.

Window tabs

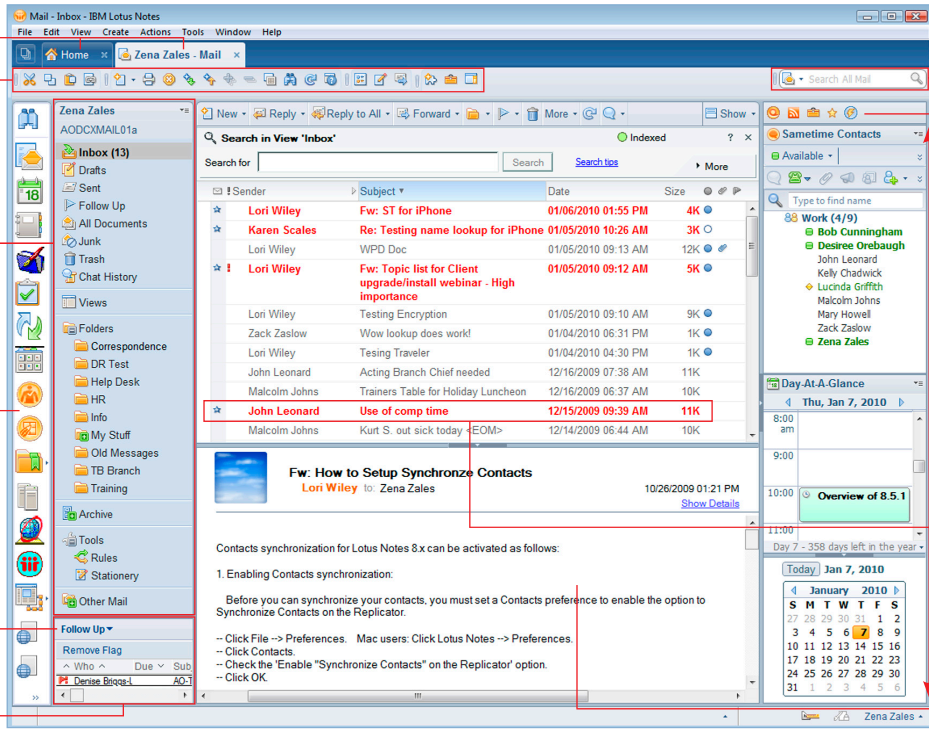
Notes toolbar with expanded icon set

Navigation pane

Docked open list with large icons. See *Using the Open Button*, page 2.

Click to change miniview pane contents.

Miniview pane



Search toolbar. See *Using the Search Toolbar*, page 2.

Sidebar icon pallet. Click on an icon to display your Activities, Feeds, Places, Sametime Contacts, and more!

Expanded right sidebar. See *Customizing the Right Sidebar*, page 2.

Unread message, marked with a star icon and highlighted in red. See *Preferences*, page 7.

Preview pane

Logging On

When you start Notes, the most recent user name and location appear in the **Lotus Notes** dialog box.

To log on: type your password in the **Password** box and click Log In.

To use a different user name or location: click ▾ beside the **User name** or **At location** box and choose the user name or location (*e.g.* **Travel**). Enter the password and click Log In.

The Home Page

The Home page displays choices for opening your most commonly used features by default. It can be accessed at any time from the Open list (see *Using the Open Button*, page 2).

To open an application: click the icon to the left of the application you want (*e.g.* for Mail).

New Additions in Notes 8.5.1

While reading this guide, look for the icon to learn more about new additions to Lotus Notes since version 7.

For an overview of important 8.5.1 features that will help you save time on common tasks or become more efficient with Lotus Notes, please see:

What's New in Version 8.5.1?, page 7, and

Enhanced Features in Lotus Notes 8.5.1, page 8.

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Navigating in Notes

You can navigate to your various work areas, bookmarks, and applications using the Open button, right sidebar, and search toolbar.

Using the Open Button

The Open button displays the Open list, which provides access to all of your work areas, bookmarks, links, and applications.

To display the Open list: at the top left of your screen, click Open.

To make the Open list visible at all times: choose **View ▶ Dock the Open List**. A panel displaying icons from the Open list appears. To close the panel, right-click an open area in the list and choose **Dock the Open List**.

Adding Bookmarks to the Open List

Organized in the Open list, bookmarks link to commonly accessed locations.

To add an item to the Open list or to a folder: open any window (*e.g.* Mail). Click and drag an item (*e.g.* a message) to an empty space on the Open list or to a folder in the list; alternatively, click the item and choose **Create ▶ Bookmark**. In the **Add Bookmark** dialog box, enter the bookmark name and click **OK**.

To find an application or document that you have bookmarked: click Open, and enter the name of the application or document in the **Type to find** box. As you type, Notes will display a list of possible matches. Click on an entry to select and open it.

To create a bookmark folder in the Open list: click Open, right-click the **Favorite Bookmarks**, **Applications**, or **More Bookmarks** folder, and choose **New Folder**. In the **Create Folder** dialog box, type a name for your folder in the **Folder name** box and click **OK**.

To set a bookmark as your Home page: click Open, right-click a bookmark, and choose **Set Bookmark as Home Page**. Click **Yes**.

To reset the Home page to the default: click Open ▶ **Favorite Bookmarks** and right-click **Default Home Page**. Choose **Set Bookmark as Home Page**. Click **Yes**.

To remove a bookmark: right-click the bookmark and choose **Remove**.

Customizing the Right Sidebar

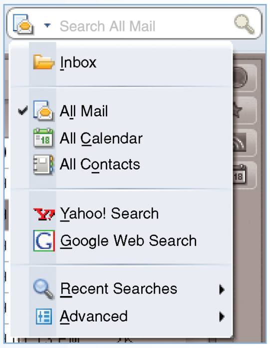
On the right side of the screen you'll find a panel, called the right sidebar, which displays your Notes applications.

To open, minimize, and close the right sidebar: choose **View ▶ Right Sidebar** and then choose **Open** to expand it, **Thin** to minimize it, or **Closed** to collapse it.

To choose which applications appear in the right sidebar: choose **View ▶ Right Sidebar Panels** and click the application you want to add (✔ appears beside it). Click the application again to remove it from the right sidebar.

To expand an application in the right sidebar: click the application icon (*e.g.* Day-At-A-Glance icon).

Using the Search Toolbar



You can use the toolbar at the top right of your screen from anywhere within Notes to perform a full text search of your Mail, Calendar, Contacts, and the internet.

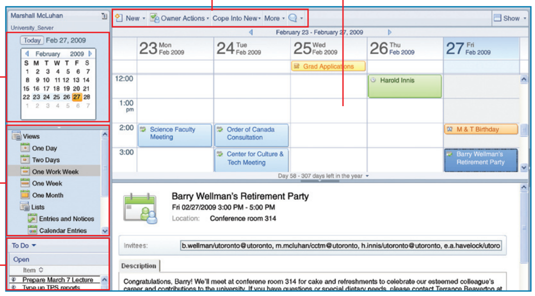
To search an open folder/view: type a search term in the toolbar search box and click **Search**.

To search a specific location: click the arrow to the left of the toolbar and choose a location. Type a search term in the search box and click **Search**.

Using the Calendar

The Calendar helps you to schedule appointments and organize your time. You can choose calendar views, summarize meetings, create group calendars, and print calendars with various levels of detail.

Click Open and choose **Calendar** to open the **Calendar** window.



Managing Calendar Views

To choose a calendar view: in the calendar views section of the Navigation pane, click a view option (*e.g.* **One Work Week**).

To summarize all meetings, appointments, and tasks for the current view: click Show and choose **Summary**. Click Show and choose **Summary** again to return to full Calendar view.

To clean up your calendar by deleting older items: click More and choose **Calendar Cleanup**. In the **Calendar Cleanup** dialog box, choose the age and type of calendar items you want to delete and click **OK**.

To filter the calendar view: click Show, choose **Filter by**, and then choose an option (*e.g.* **Chair**). If a dialog box opens, refine your filter selection and click **OK**. To remove a filter, click Show, choose **Filter by**, and then choose **None**.

Navigating the Calendar

To go to another month: click the arrows (August 27 - September 2, 2007) above the calendar to go to the next month or the previous month.

To go to another date: click the day on the date picker or in the Calendar view. Press the arrow keys on your keyboard to go to previous or subsequent days.

To return to today's date: click Today above the date picker.

Creating a Group Calendar

Create a group calendar to view the schedules of other Notes users.

1. Click More and choose **Create Group Calendars**. In the **Group Calendars** window, click New Group Calendar.
2. In the **New Group Calendar** dialog box, type a name for the group in the **Title** section, and click ▾ at the bottom right of the **Members** box.
3. In the **Select Names** dialog box, click a name you want in the group, and then click Add ➤ to move them to the **Names** section on the right.
4. Click **OK** to close the **Select Names** and **New Group Calendar** dialog boxes. The group calendar opens, and its name is added to your **Group Calendars** list.

Printing a Calendar

1. Click the print icon on the Notes toolbar or press CTRL+P.
2. In the **Print Calendar** dialog box, under the Printer tab, choose a print option from the **Calendar style** list (*e.g.* **Weekly Style**).
3. In the **Print Range** area, click 16 in the **From** and **to** boxes and set the date range you want to print. Click the Calendar Style tab and choose any desired style options (*e.g.* **Hide private entries**). Click **OK**.

Scheduling Meetings and Activities

You can set up meetings and verify that your invitees are available. You can also reply to meeting invitations and schedule personal activities.

Setting up a Meeting

1. Click Open ▸ **Calendar**, and then click New ▸ **Meeting**.
2. In the **Subject** box, type the meeting description (*e.g.* `Discuss sales`).
3. In the **Starts** box, click Fri 02/20/2009 16. From the pop-up date picker, click the date when the meeting will take place.
4. In the **Starts** and **Ends** boxes, click 1:15 PM to enter a start and end time for the meeting. Drag the markers to the time you want the meeting to start (*e.g.* 01:15 PM) and end (*e.g.* 02:15 PM), then click ✓ to close the time picker.

To set up a recurring meeting: click Repeat. In the **Repeat Options** dialog box, choose options as needed and click **OK**.

5. Click Required. In the **Select Addresses** dialog box, click the name of a person you want to invite. Click an attendance option (*e.g.* Required ➤) to add each person to the meeting. Click **OK** when finished.

To reserve a room or a resource for your meeting: click Rooms or Resources. In the **Rooms** or **Resources** dialog box, select from the list, click Add ➤, and then click **OK**.

6. To confirm the availability of invitees, rooms, or resources, click Find Available Times, and then choose **Details**. If there are no time conflicts, your meeting will appear as a green vertical bar in the timeslot you chose. If the bar is red, click and drag it to a timeslot where all invitees and resources are available (free time appears as , while indicates that they're busy). Alternatively, click **Summary**, select one of the suggested timeslots, and then click **Use Selected Time**.
7. Click Description, click **Enter the description of this event**, and type a short description of your meeting. Click Attach... to attach a file.
8. Click Save and Send Invitations.

Changing Meeting Requests

To reschedule a meeting you requested: find the meeting (*e.g.* **Discuss sales**) in your calendar and click it. Click Owner Actions, choose **Reschedule**, and then make changes in the **Reschedule Options** dialog box. Click **OK**.

To reschedule a meeting someone else requested: find the meeting in your calendar and click it. Click Respond, choose **Propose New Time**, and then provide details in the **Propose Options** dialog box. Click **OK**.

To cancel a meeting you requested: find the meeting in your calendar and click it. Click Owner Actions, choose **Cancel**, and then click a cancellation option in the **Cancel Options** dialog box. Click **OK**.

Replying to a Meeting Request

Click Open ▸ **Mail** and choose **Inbox** from the Navigation pane. Double-click your new meeting request to open it. Click **Accept** or **Decline**, or click Respond and choose an option (*e.g.* **Accept with Comments**).

Scheduling Appointments and Activities

Activities and appointments don't involve other participants. See *Calendar Icons* on the shortcuts panel to view the icons that represent these items.

1. Open your calendar, click New, and choose an option.
2. In the **Subject** box, type a description of the activity (*e.g.* `LAN Party!`).
3. Enter the activity date and time. For recurring activities, click Repeat, provide details in the **Repeat Options** dialog box, and click **OK**. To prevent others from opening the item when your calendar is shared as part of a group calendar, check the **Mark Private** box ☑. Click Save and Close.

Creating and Assigning To Do Items

To Do items are tasks that you can schedule for yourself or assign to others. These tasks are displayed in the To Do list. You can also view them in the Calendar and the Day-At-A-Glance section of the right sidebar.

Creating a Personal To Do Item

1. Click Open ▸ **To Do** and click New.
2. In the **Subject** box, type a description for the task.
3. Click 16 in the **Due by** and **Start by** boxes, and use the pop-up date picker to choose beginning and end dates.

To create a recurring task: click Repeat. In the **Repeat Options** dialog box, choose details and click **OK**.

4. Choose a priority level from the **Priority** list (*e.g.* **Medium**).
5. Click Save and Close to add the new task to your To Do list. The task is also displayed in the Calendar on its start date.

Assigning a To Do Item to Others

1. Follow steps 1–4 of *Creating a Personal To Do Item*, above.
2. In the **Assign To** area, click **Others**.
3. Click Required. In the **Select Addresses** dialog box, click the name of a person to assign the task to. Click an option (*e.g.* Required ➤) to add the item to their To Do list. Click **OK**.
4. Click Save and Send Assignments.

Viewing and Editing To Do Items

To view your To Do items: click Open ▸ **To Do** to open the To Do list.

Icons and status indicators:

- ① .... Personal task with high priority
- ② .... Personal task with medium priority
- ③ .... Personal task with low priority
- .... Group task
- .... New task
- .... Completed task
- .... Delegated/declined task

To edit a To Do item:

1. In your To Do list, double-click the To Do item you want to edit.
2. Make changes, then click Save and Close to update the item.

To complete or remove a To Do item:

1. In your To Do list, click the To Do item.
2. Click Mark Complete, or ✖ to delete an item. Completed items appear with a checkmark. Deleted items are removed from your task list.

Responding to a To Do Item Assigned to You

1. Click Open ▸ **Mail**. Double-click the new To Do message to open it in a new window.
2. Choose one of the following options:
   - **To accept a To Do item:** click Accept.
   - **To decline a To Do item:** click Decline. In the **Decline Confirmation** dialog box, check the information box if desired, and click **OK**.
   - **To delegate a To Do item:** click Respond, and choose **Delegate** from the menu. In the **Delegate Options** dialog box, click ▼, choose a name from the **Select Name** dialog box, and click **OK**. Click **OK** once more to send the delegated task.

New since Lotus Notes 7

Receiving Mail

Your Inbox contains received email messages, assigned tasks, and meeting requests.

Lotus Notes 8.5.1 introduces enhanced drag-and-drop mail management to your Inbox. Try clicking on a message and dragging it to a folder or the trash!

Viewing Your Inbox

Click Open ▸ Mail, then click Inbox in the Navigation pane. Unread messages appear in bold. To display unread messages only, click Show and choose **Unread Only**.

To show new messages: click in the Notes or message toolbar, or press F9.

To view a message: double-click the message to open it. To preview a message, click it, click Show, and then choose **Preview on Bottom** or **Preview on Side**.

To mark a message as read or unread: right-click the message and choose **Mark as** ▸ **Read** or **Unread**. Alternatively, click a message to select it and press the INSERT key to toggle between read and unread status.

To sort your messages: click a column header (*e.g.* Date ▾). You can sort according to importance, sender, subject, date, size, or follow up status.

To view conversations: click Show and choose **Conversations**.

To display a message thread: click the message, and then click the thread arrow icon beside the message's subject name.

To identify messages sent only to you: click Open ▸ Mail, and then click More and choose **Preferences**. Click Attention Indicators and, under **Recipient Indicators**, check the **Mail sent to me only** box. Click **OK**. Messages for which you are the sole recipient will now display a circle icon.

To add a sender to your contact list: click the message, click More, and choose **Add Sender to Contacts**. Add information as needed and click **OK**.

Follow Up Flags

To flag a message for follow up: click the message, click , and choose **Add or Edit Flag**. In the **Flag for Follow Up** dialog box, click a priority option, enter a follow up action and date, and then click **OK**. A flag icon (*e.g.* Urgent, Normal, Low) appears beside the message.

To Quick Flag a message: click the message, click , and choose **Quick Flag**.

To change the Quick Flag defaults: click More and choose **Preferences**. In the **Preferences** dialog box, click the Follow Up tab, and choose appropriate options. Click **OK** to save these options as Quick Flag defaults.

Responding to Messages

To reply to a message: double-click the message, click Reply or Reply to All, and choose a reply option (*e.g.* **Reply with History Only**). Type your reply in the message area and click Send.

To forward a message: double-click the message, click Forward, and then choose a forward option. Click To and choose recipients to forward the message to. Add text to the message area if necessary, and click Send.

Opening File Attachments

A message with an attachment has a icon beside it in your Inbox. Double-click the message, and then double-click the attachment icon (*e.g.*).

To open the attachment: click Open. The file opens in the application in which it was created (*e.g.* Excel, Word). If you don't have the application, click View.

To save the attachment to your computer: click Save. In the **Save Attachment** dialog box, browse to a location and click **Save**.

Sending Mail

When you create messages, you can attach files, assign a variety of mail delivery options, and apply text formatting.

Creating a Message

1. Click Open ▸ **Mail**. Click New.
2. In the message window, click To. In the **Select Addresses** dialog box, click to select a contact from the list. Click To to move the name to the **Recipients** list. Repeat until all desired recipients are added. Click **OK**.

Tip: You can also double-click a contact to move them to the **Recipient** list.

To send copies: choose recipients and click cc or bcc.

Note: Blind carbon copy recipients (bcc) do not appear in the recipient list at the top of the message when it is sent.

3. In the **Subject** text box, type a brief description of your message. In the body field, type your email message. If you want to format your message text, select the text, right-click it, and choose **Text Properties**. On the *a* tab, format the text by choosing from the **Font**, **Size**, **Style** and **Color** boxes. Click ✕ to close the **Text** dialog box. Alternatively, you can use the text formatting toolbar located above the mail window.
4. Click Send.

Tip: When addressing a message, you can also type recipients' names in the To, **Cc**, and **Bcc** boxes. If the recipients are in your address books, Notes automatically completes their addresses once you begin typing their names.

Attaching a File to Your Message

1. Create a message by following steps 1–3 of *Creating a Message*, above.
2. Click inside the body field and choose **File** ▸ **Attach** or click .
3. In the **Create Attachments** dialog box, choose the file that you want to attach (to attach multiple files, hold CTRL as you click each file). Click Create.

Assigning Mail Delivery Options

1. Create a message by following steps 1–3 of *Creating a Message*, above, and then click Delivery Options...

To specify message importance: click beside the **Importance** box and choose an option from the list (*e.g.* **High**).

To be notified when your message is received: check the **Return receipt** box ☑.

To prevent recipients from forwarding to others, replying with history, copying to the clipboard or printing: check the **Prevent copying** box ☑.

To add a digital signature and encryption: check the **Sign** and **Encrypt** boxes ☑.

Note: Options to prevent copying or add digital signatures/encryption may apply only to recipients who also use a Lotus Notes email client.

To automatically check spelling before sending: check the **Auto spellcheck** box ☑.

2. When you are finished setting delivery options, click **OK** and then click Send.

Setting an Out of Office Notification

1. Click Open ▸ **Mail**. Click More and choose **Out of Office**.
2. Click Fri 02/20/2009 beside the **Leaving** and **Returning** boxes, and choose your leaving and returning dates using the pop-up calendar.
3. Type a subject and message in the **Standard Notification** area.

To send a different notification to specific people: click the **Alternate Notification** tab, enter a recipient in the To box, and type a custom subject and message.

4. Click Save and Close.

To cancel an out-of-office notification: click More and choose **Out of Office**. Click Disable and Close.

New since Lotus Notes 7

Ask the Help Desk

Here are the answers to some common questions about Lotus Notes. Do you want to...

...enable Instant Spell Check?

Choose **File ▸ Preferences**. In the **Preferences** dialog box, click **Spell Check** and check the **Enable Instant Spell checking** box ☑. Click **OK**.

...prevent junk mail from being delivered to your Inbox?

To block mail from a specific sender: right-click a message and choose **Block Mail from Sender**. In the **Blocked Senders List** dialog box, click **OK**. Subsequent mail from the blocked sender is routed to the **Junk** folder. This feature cannot be used to block other Notes users on your system.

To remove a sender from your junk mail list: open the **Junk** folder on the Navigation pane and click Manage List... . In the **Blocked Senders List** dialog box, click the sender, click **Remove**, and then click **OK**. Alternatively, right-click a message from the sender and choose **Unblock**.

To block mail based on message subject, sender, or sender domain: select the type of message you want to block, click More and choose **Create QuickRule**. In the **Create QuickRule** dialog box, select the conditions and action options (*e.g.* **Do not accept message**), and then click **OK**.

...mark email as read when it's selected and viewed in the preview pane?

Choose **File ▸ Preferences**. Click **Basic Notes Client Configuration**. Under **Additional options**, click **Mark documents read when opened in preview pane**. Click **OK**.

...change your password?

1. Choose **File ▸ Security ▸ User Security**. Type your password and click **OK**.
2. In the **User Security** dialog box, click Security Basics and then click Change Password... .
3. Type your current password in the **Lotus Notes** dialog box and click **OK**.
4. In the **Change Password** dialog box, type your new password in the **Enter new password** box and then type it again in the **Re-enter new password** box. Click **OK** twice.

...automatically save email and documents while creating or editing them?

Choose **File ▸ Preferences**. Click **Basic Notes Client Configuration**. Under **Startup and shut down**, check the **AutoSave every 15 minutes** box ☑. If desired, change the autosave interval. Click **OK**.

To recover an autosaved document or email: choose **File ▸ AutoSave ▸ Recover AutoSaved Documents.** Select the document you want to recover and click **Recover**.

...automatically add a signature to the bottom of outgoing messages?

1. Click Open ▸ **Mail**, and then click More and choose **Preferences**.
2. In the **Preferences** dialog box, click the Signature tab. If you want the signature to appear on all messages, check the **Automatically append...** box ☑. Type the signature (usually your name and contact information) in the text box. Click T for formatting options. Click **OK**.

Note: If you left the **Automatically append...** box unchecked, you must add the signature manually. Position the cursor at the end of an unsent message, click More and then choose **Insert Signature**. In the **Include Signature** dialog box, choose **Select from 'Mail Preference'**, and click **OK**.

...view thumbnails of all open windows?

Click the Show Thumbnails button located next to the Open button, or press CTRL+SHIFT+T. Click ✕ to hide thumbnails, or double-click on a thumbnail to open the corresponding window tab.

...recall a message?

Click Open ▸ **Mail** and click **Sent** on the Navigation pane. Right-click a message and choose **Recall Message**. Select the recipients to recall from, choose recall options, and click **OK**.

Note: Both you and the recipient must be using similar Lotus Notes software, and the recipient must have set mail preferences to allow mail recall.

...browse the internet from within Lotus Notes?

To open the Web browser: click Open ▸ **Web browser**.

To open a Web page: enter an address in the address bar at the top of the window and press ENTER.

Adding and Working with Contacts

You can store personal email addresses and other contact data in the Contacts area.

Adding and Editing Contacts

1. Click Open ▸ **Contacts**. Click New.
2. Type your contact's name in the Contact Name box. In the E-mail box, type the email address. Type additional details in the contact information boxes.

Tip: If you have files that you want to associate with the contact (*e.g.* a picture or document), click the Import button, select a file, and then click Import.

3. Click Save and Close.

To edit a contact's information: click the contact you want to edit, and then click Edit. Edit the entry and click Save and Close.

To delete a contact: click the contact you want to delete, then click in the action bar above to move the contact to your **Trash** view. Switch to **Trash** view (see *Contact Views*, below), select the contact and press ✕.

Contact Views

Select a view from the Contacts Navigation pane.

- **My Contacts:** A list of all your contacts.
- **Recent Contacts:** A list of people with whom you have had contact recently.
- **Groups:** A list of all your groups.
- **By Category:** Contacts grouped by category.
- **By Company:** Contacts grouped by company.
- **Birthdays & Anniversaries:** A list of birthdays and anniversaries sorted by date.
- **Trash:** Contact entries that have been deleted.

To view contact entries as business cards: click Show and choose **Business Cards**.

Creating a Mail Group

1. Click Open ▸ **Contacts**. Click New and choose **Group**.
2. Type a name for the new group and click Members.
3. In the **Select Names** dialog box, click the name of a person you want to add to the group. Click Add ➤ to move each contact to the group list on the right. Click **OK** when finished.
4. Click Save and Close.

Copying From the Company Address Book

1. Click Open ▸ **Contacts**, and then click Browse for Contacts.
2. In the **Find People** dialog box, click beside the **Directory** box and choose your company's address book from the list. Click the person or group you want to add to your personal address book.

Note: Groups appear with the group icon (*e.g.* **Sales**).

3. Click Add to Contacts below the contact list. A message indicates that the selected contact has been added to your address book. Click **OK**, then Close.

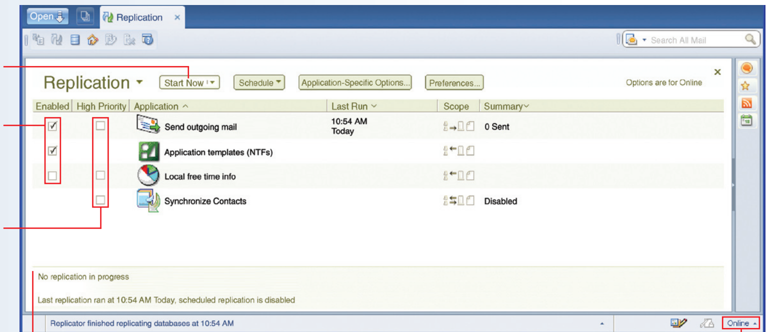
Replicating Applications

When you are working away from the office, you can use replication to synchronize your Notes applications with the information stored on your company's network. You can choose which information to replicate (*e.g.* to send/receive your email messages only) and schedule when replication occurs.

Starting the Replicator

Note: This section assumes that Notes has been correctly configured for your work location, and that your computer is connected to your company network through a dialup or high speed connection.

1. Click Open and choose **Replication**.



2. Click the location menu button Online on the status bar at the bottom-right corner of the window, and then choose your current location (*e.g.* **Home**).

Replicating Your Files

To update your mail files only: click Start Now, and then choose **Start Mail Only Now**. The replication progress bar appears at the bottom of the window.

To update selected applications: check the boxes ✓ beside the applications you want to replicate (*e.g.* **Local free time info**). Click Start Now at the top of the window. The replication progress bar appears at the bottom of the window.

Tip: If you want to replicate a single application only, right-click the Scope icon ( ) beside the application (*e.g.* **Send outgoing mail**) and choose **Replicate Selected Application**.

To set the replication schedule at your location:

1. Click Schedule and choose **Set Replication Schedule**.

Note: The schedule you set will apply to the location name visible in the status bar. You can set different application schedules for each location.

2. In the **Replication Schedule for location...** dialog box, check the **Replicate at this interval for normal priority** box ✓. Set the schedule using the **Daily from**, **Repeat every**, and **Days of the week** fields.
3. Check the **Replicate at this additional interval for high priority** box ✓ to set an additional schedule for applications marked as high priority.
4. Click **OK**. The next scheduled replication time appears in the replication schedule area (*e.g.* Last replication ran at 03:12 PM Today, next replication is at 04:12 PM).

Working Remotely Using J-RAN

You can use your browser and J-RAN to remotely access your Lotus Notes email.

1. In your web browser's address field, type http://jran.uscourts.gov and press Enter.

Note: If a security alert window displays, select **Trust this site**, **Always**, and then click **Trust**.

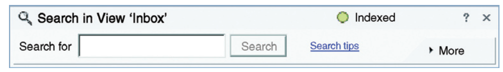
2. If this is the first time you have used J-RAN, click **Continue** to install necessary J-RAN security files.
3. On the J-RAN Welcome screen, click **Continue**.
4. On the login screen, enter your Lotus Notes internet email address and password and click **Submit**.
5. Click on the **Mail** tab to view your Inbox and email.

Using Search

You can search for items and people in your Mail, Calendar, Contacts, and To Do views.

Searching for Items

1. Click Open and choose an option (*e.g.* **Mail**) to open the application you want to search.
2. Choose **View ▸ Search This View**. The **Search in View** panel opens at the top of the view window.



3. Type the words you are searching for, and click Search. The search results display at the top of the search panel (*e.g.* **19 documents in View 'Inbox' matched your search.**). Double-click items to open them.

Note: If you search in Calendar view and want a summary list of your found items, click Show at the top right of the Calendar window and choose **Summary**.

4. Click **Clear Results** and repeat step 3 to do another search. Click ✕ to close the search panel.

To search the results of a search: follow steps 1–3 (above). With your search results displayed, click More in the **Search in View** panel and check the **Search in results** ✓ box. Type different keywords in the **Search for** box and click Search. Notes displays a subset of your original search that matches the new keywords.

Note: Advanced search features accessed by the More button only work on indexed databases.

To conduct a quick search using the Find box: press CTRL+F. In the **Find** dialog box, enter search keywords in the **Find** field, or click to choose from a list of previous search terms. Click Find Next to find and highlight results within the active Notes application.

Determining Where Items are Filed

Locate specific documents by doing the following:

1. Click Open and choose **Mail**. Click **All Documents**.
2. Select the document in the message list, click and choose **Discover Folders**. The **Folders containing:** box then lists the folders in which the document is filed.

Searching for People

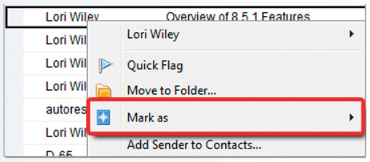
1. On the **Search** toolbar, click Search All Mail and choose **Advanced ▸ Find People**.
2. In the **Find People** dialog box, click beside the **Directory** box, and choose the directory you want to search.
3. Begin typing the person's last name in the **Find names starting with** box until the name appears in the list below the box. For details on the person, select them and click Details... . Click Close to end the search.

What's New in Version 8.5.1?

General UI Improvements

Right-click

Right-click to see a more concise menu with options relevant to the context. Additionally, you can right-click documents to mark them as read or unread.

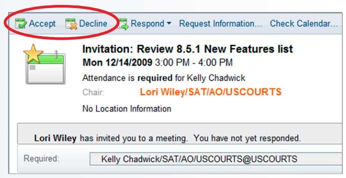


Business Cards

You can view a person's business card when you hover over their name in your Inbox, To, Cc, Bcc, or type-ahead lists in emails, calendar entries and invites, Sametime Contacts list, chat windows, Activities, and more.

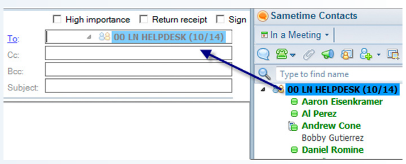
Meeting Actions

Perform meeting actions, such as **Accept** and **Decline**, from the preview pane in Mail, Calendar, and To Do.



Drag and Drop

Drag and drop between rich text fields in Notes documents (Windows only). Drag Sametime names or groups to Notes name fields and rich text fields.



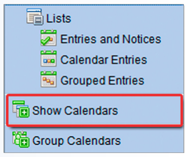
Calendar

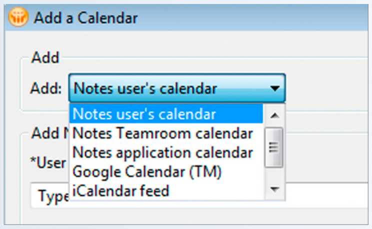
Adding or viewing other calendars has been significantly enhanced in Notes 8.5.1. However, there are a few prerequisites:

- Ensure delegation is granted by the mail/calendar file owner:
  - ◊ Set the default access for Calendar to grant everyone (or a specific group) read access for any calendar entry, To Do item, or Contact item.
  - ◊ Set the default schedule information that so that everyone (or a specific group) is allowed to see Details about my calendar entries. Ensure everyone can see the subject of the calendar entries in Details.
- Mail/Calendar design for the calendar being displayed *must* also be Notes version 8.5.1 or later.

Adding a Calendar

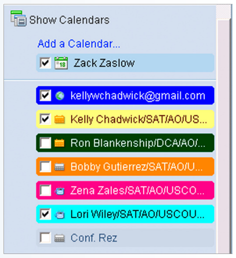
To add a calendar in the calendar views area of the Navigation pane, expand the **Show Calendars** section, click **Add a Calendar**, and follow the prompts.





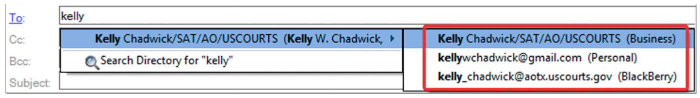
Add private or public Google calendars, an iCalendar feed, another Notes user's calendar, or a Notes application's calendar (*e.g.* a TeamRoom's calendar).

To display or hide the added calendar's entries, select or deselect the check box ☑ beside the calendar's name under **Show Calendars**.



Mail

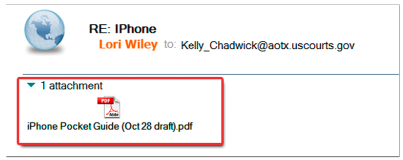
To select an alternate email address for a person listed in My Contacts: begin typing a name, hover over the desired email address, and click to select an option from the menu that appears.



To permanently delete files: from any mail view, right-click **Trash** in the Navigation pane and choose **Empty Trash** from the menu.

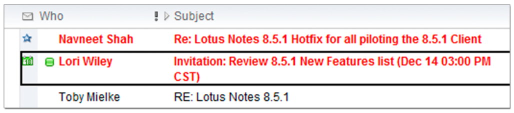
Attachments

When you receive mail that includes attachments from an Internet address, the attachments are included at the top of the message in a collapsible section. This includes internal mail sent through an SMTP server.



Preferences

Back by popular demand, you can use red text to indicate unread documents.



Choose **File ▸ Preferences** and then click the **Fonts and Colors** option. In the **Unread mail indication** area, choose **Plain red text**. Also note that this preference screen provides you with an easy way to enlarge the text in the data areas of Notes, such as the Inbox and within messages.

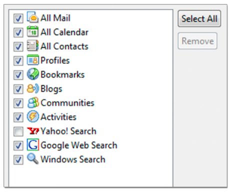
Spell Check Preferences

The new Spell Check preference options let you automatically correct three common typing errors:

- Typical spelling errors, such as "teh" instead of "the"
- Starting a sentence with a lowercase letter
- Typing two capital letters in succession, such as "JOhn"

Search Toolbar Preferences

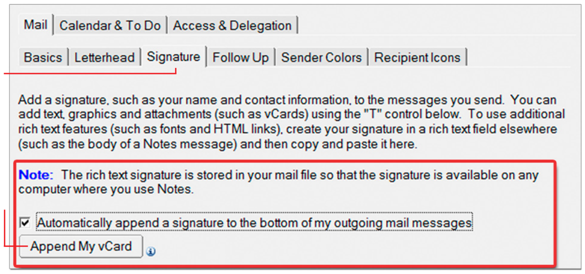
Show or hide what displays in the search list in the Search toolbar. Navigate to the Search preference screen, and then click **Search List**.



Mail Signatures

Notes 8.5.1 stores the mail signature on the server. If a signature is specified in Mail preferences, it will be available on any computer using Notes or iNotes. A vCard can now be appended to the signature. Expand the **Mail** preference area, and then click the **Signature** tab. Click **Append My vCard**.

Signature tab



Append My vCard button

Enhanced Features in Lotus Notes 8.5.1

Empty Trash From the Right-Click Menu

From any mail view, right-click on the **Trash** folder and select **Empty Trash**.

Folder Column in Mail All Documents View

A new **Folder** column in the Mail **All Documents** view displays the mail folders where a document is currently being stored.

Automatically Compress Pasted Images

Bitmap (.bmp) images that are imported into a Notes document are now compressed for faster transfer. Any bitmap images that is pasted into a Notes document is converted to a smaller and more web-friendly .gif or .jpg format.

Archiving Improvements

Visual differences between an archive and regular mail make it easy to tell when you are working in an archive. The subject line of archived messages say (Archived) and the header includes the date of when the message was archived. You can quickly find your recently archived messages by opening the **Recently Archived** folder in an archive.

New Sametime Features

- Dragging messages to add names to your Sametime Contact list
- New tools to annotate screen captures
- Ability to save screen capture as an image
- Option to include date stamps in text chats
- New options for Single Sign-On (SSO).

Importing and Exporting Contacts

You can now import and export your Notes contacts in a variety of formats.

To export Notes contacts: click Open ▸ **Contacts**. Choose **File ▸ Export Contacts**. In the **Export Contacts** dialog box, choose options for your exported contacts. You must specify a **Save to** location and **File name**. Click Export to create the Notes contacts file.

Tip: In the **Export Contacts** dialog box, under the **Advanced Options** section, make sure to check the **Include field names** box. This option will simplify the process of importing the contacts file on other computers.

To import contacts into Notes: click Open ▸ **Contacts**. Choose **File ▸ Import Contacts**. In the **Import Contacts** dialog box, locate and select the contacts file you want to import, and click Open. Click Map Fields to edit contact information if desired, and click Import when finished.

Forwarding Contacts as vCards

You can forward contact information in the form of a vCard to other Lotus Notes users.

To forward a contact as a vCard: click Open ▸ **Contacts**. Select the contact you want to forward, and click Forward vCard. Add one or more recipients to the To area, enter a new subject or body message (if desired), and click Send.

Shortcuts

Navigating Notes Applications

View the Open menu	ALT+B
Refresh the window	F9
Tab selection menu	CTRL+F8
View thumbnail selection screen	CTRL+SHIFT+T
Open a Find dialog box	CTRL+F
Close selected tab	ESC
Lock Notes session	CTRL+F5
Exit Notes	CTRL+Q or ALT+F4

Mail and Documents

Move to next unread document	F4
Delete selected items	DELETE
Delete selected items permanently	SHIFT+DELETE
Mark item as read/unread	INSERT
Format text font, size and color	CTRL+K
Find and replace text	CTRL+F
Select all	CTRL+A
Increase/reduce size of selected text	F2/SHIFT+F2
Add/remove indent	F8/SHIFT+F8
Show/hide ruler	CTRL+R

Mail Icons

- Unread message
- Forwarded message
- Replied to message
- Forwarded and replied to message
- Message sent to you only
- / Message sent to a few/many people
- Sent message
- Draft message
- High priority
- New meeting invitation or task
- Rescheduled meeting
- / Sent invitation accepted/declined
- / / Follow up (urgent/normal/low priority)

Calendar Icons

- Meeting
- Appointment
- Reminder
- Incomplete task
- Completed task
- All Day Event
- Anniversary
- High priority

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